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OUR VIEWS HAVEN'T CHANGED

FY21 ANNUAL ECONOMIC IMPACT REPORT

VISION

Create an Arizona experience that captures and nurtures the hearts and minds of people who call it home and travelers the world over in search of extraordinary adventure and natural wonders.

MISSION

We stabilize and strengthen local economies, protect environmental and cultural resources, create a meaningful visitor experience and enhance the quality of life for Arizonans through tourism collaboration, promotion and development.

Letter from the Director

Dear Industry Partner,

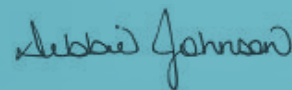
It goes without saying that this past year will be remembered as one of the most challenging times we've ever experienced, both as an industry and as individuals. But that isn't the entire story. Not by a long shot. I'm much more focused on the work we're doing to foster recovery now and building toward sustained success.

For AOT, FY21 was driven by a wide range of strategies defined in our Arizona Tourism Industry Strategic Recovery Plan and designed to accelerate the recovery of travel and tourism throughout the state. I'm very proud to report that this ongoing effort has been tremendously successful. We were privileged to adapt and expand our regular work to support pressing industry needs.

We also built and launched Appreciate AZ, our state's brand for responsible and sustainable tourism, by introducing and building awareness of the program. But that was just the start. Appreciate AZ is designed to become an imperative in our approach to delivering tourism experiences across our state. There's more to come in upcoming years for this exciting program!

We also continued to promote Arizona as a destination through consumer advertising campaigns, social media engagement, itinerary creation, media education and travel trade trainings – all in an effort to keep Arizona top-of-mind as a travel destination.

As our attention turns to meeting upcoming challenges and taking advantage of new opportunities, please remember to take a moment to congratulate yourself and your teams for getting through an especially tough year. We look forward to continuing our collaborative work to promote recovery and build prosperity throughout Arizona!



Debbie Johnson, Director
Arizona Office of Tourism

Strategic Planning

The Arizona Office of Tourism (AOT) leads the state's tourism industry in the development of global marketing programs to promote Arizona as a travel destination. With multiple research-based initiatives including advertising campaigns, cooperative marketing programs, trade and media relations and community outreach, AOT sets into motion a positive and profitable cycle of visitation, spending, job growth and tax revenue. To accomplish this, AOT continually develops strategic plans to maximize program reach and effectiveness.

The foundation of our plan includes three overarching strategic goals:

Strategic Goal

1

Increase Total Visitation and Direct Spending

Strategic Goal

2

Cultivate a Productive Arizona Tourism Industry

Strategic Goal

3

Maximize Internal Agency Functions

In our FY21 Annual report, you will see results of the work we accomplished and how each initiative ties back to one of our strategic goals.

Arizona Tourism Recovery Plan

Strategic Goal

1

In March 2020, the global pandemic hit Arizona. AOT understood quickly that the pandemic was going to have a severe impact on the state's tourism industry and developed an 18-24-month Arizona Tourism Strategic Recovery Plan. Our plan was created in consultation with 25 diverse stakeholders from the tourism industry, including business-related partners from urban, rural, and tribal communities representing all sectors of the tourism industry. It included multiple marketing initiatives that complemented the agency's typical program of work, and helped the agency explore new collaborative opportunities with communities across the state.

Arizona was one of the first destinations to unveil such a plan and take action to support the businesses that needed it the most during the hard economic time. In July 2020, we unveiled our plan to the Arizona tourism industry with three main objectives:

AREAS OF FOCUS

1. Accelerate Leisure Travel Activity Statewide
2. Stabilize Visitor Volume in Urban Centers
3. Reinvigorate and Strengthen Tourism in Rural and Tribal Areas

AOT created two internal teams representing rural/tribal and urban tourism related concerns. Building from the three main areas of focus mentioned above, the AOT teams developed a wide variety of tactics that were either led by our agency or were managed by the community itself, with AOT serving as a resource. Tactics ranged from promoting public health recommendations and conducting community surveys to updating website content and initiating major marketing campaigns.

THE LIST OF TACTICS INCLUDED:



Creation of trip itineraries that represented rural, tribal, and urban destinations across the state



Creation of multi-state road trip itineraries with Utah and Colorado



Development of comprehensive visitor and resident resources that featured Arizona-specific guidance, closure lists, and international travel guidance



Development of industry-related guidance providing appropriate recommendations for all segments of the Arizona tourism industry including, visitor centers, lodging establishments, attractions, pools, and casinos



Development of Virtual Destination Trainings for global travel trade



Deployment of surveys to rural, tribal, and urban destinations to understand marketing needs during and after the pandemic

RESULTS

- ➔ A total of 219 tactics were developed, addressed, and completed.

Appreciate AZ

Strategic Goal

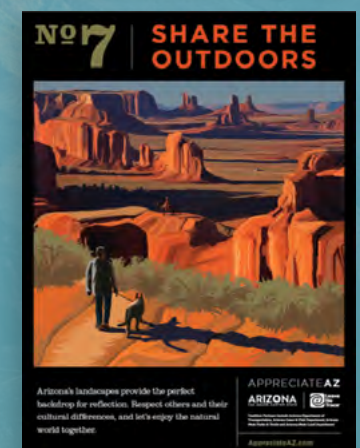
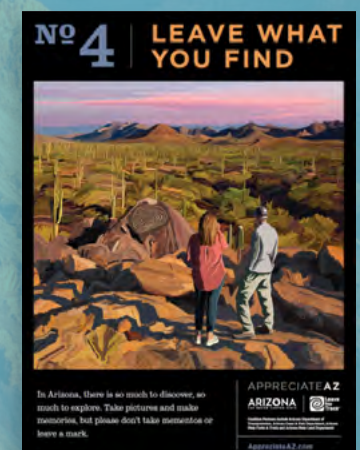
2



AOT and the Leave No Trace Center for Outdoor Ethics forged a partnership to promote sustainable tourism practices across Arizona. As a result, AOT built Appreciate AZ, Arizona's brand for responsible and sustainable tourism. The program ensures visitors and residents are equipped with the knowledge and skills to protect our state's iconic natural features for the current and future generations. The program includes a series of beautifully designed illustrations of Appreciate AZ's 7 Principles of Leave No Trace, a multi-channel media plan including video, digital, programmatic, paid social, digital education courses, webinars, as well as DIY branded clean-up kits that were distributed across the state as an actionable promo item.

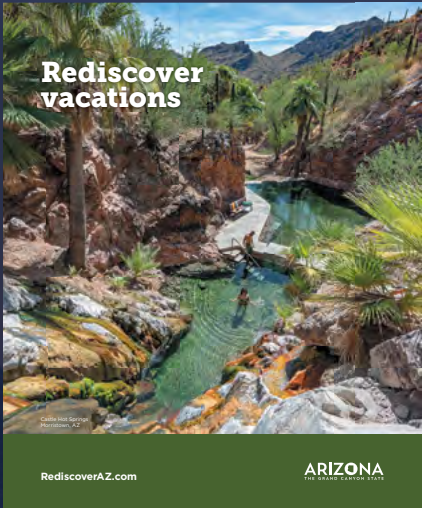
RESULTS

- ➔ Total Website Sessions Reached: 43,000
- ➔ Held two program-related webinars
- ➔ Built three digital courses



Consumer Advertising

Strategic Goal 1



Rediscover Arizona

Rediscover Arizona was designed to help rebuild the state’s tourism economy and offset the substantial loss of spending and tax revenue generated due to the pandemic. As health measures improved and travel restrictions eased, we expanded the campaign media buys to reach consumers in targeted local markets and some regional locations. Communities were invited to be part of the advertising media buy through a “Bring Your Own Budget” option.

RESULTS

- ➔ 41% Campaign Awareness Generated
- ➔ Reached 39 Million Target Households
- ➔ ROI was \$203 for each \$1 invested



Arizona Tourism Jobs

This campaign served two purposes. During the pandemic, AOT launched a website resource (AzTourismJobs.com) aimed at connecting the displaced hospitality workforce with industries that were urgently hiring. A year later, to help alleviate the workforce shortage, we collaborated with two workforce development organizations, PipelineAZ and ARIZONA@WORK, to repurpose the website resource and reconnect job-seekers with tourism career opportunities.

RESULTS

- ➔ 44 Employers Registered
- ➔ 253 Job Seekers Registered
- ➔ 135 Job Seeker Applications Processed



Arizona’s Year of the Road Trip

Arizona’s Year of the Road Trip provided itineraries for those who were ready to travel. We worked with Country Music artist Mitchell Tenpenny. His video for the song “Bucket List,” was filmed entirely in Arizona and highlights some of the state’s most spectacular locations. The campaign featured road trip ideas, including visiting the canyons of Northern Arizona, wine regions of Central and Southern Arizona and a “Take It Outside” itinerary offering options for several drives across the state.

RESULTS

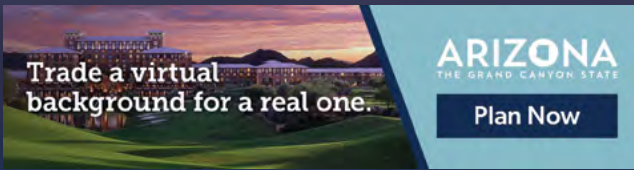
- ➔ 12 Itineraries Developed

Arizona Meetings Mean Business

The Arizona Meetings Mean Business campaign built awareness of Arizona as a premium meeting destination and urged meeting planners to consider Arizona for upcoming meetings and events. To accomplish this, AOT and statewide partners joined efforts to saturate the meetings industry with Arizona Meetings messaging. A landing page (arizanameetings.com) acted as a partner hub for information and a strategic media buy was executed with AOT’s branding as well as partner-specific messaging.

RESULTS

- ➔ 11 DMOs and Communities Participated
- ➔ Connected to 5,600 Meeting Planners



Arizona Wine Industry

Increased awareness of Arizona’s wine industry, along with the three wine regions of the state. Campaign material inspired in-state residents to explore the wine trails and buy local wine products. The campaign was supported by media relations efforts and social media activities.

RESULTS

- ➔ Reached an estimated 14% of Arizona Households
- ➔ Developed interactive map featuring 120 wineries and tasting rooms

Arizona Trails

The Arizona Trails campaign increased awareness for two major Arizona trails, the Arizona National Scenic Trail and the Sun Corridor Trail. Our digital campaign for the Arizona Trail increased awareness and inspired exploration of the trail for in-state residents and out-of-state visitors. Our efforts for the Sun Corridor Trail included building a website to brand and promote the trail.

RESULTS

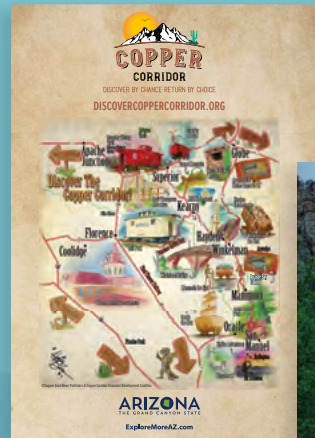
- ➔ Total Website Sessions Reached: 15,258
- ➔ Support website development for Sun Corridor Trail Promotion



Rural & Tribal Marketing Cooperative Program

Strategic Goal

1



The Rural & Tribal Marketing Cooperative program is designed specifically for rural destination marketing organizations (DMOs), regional partnerships, statewide tourism associations, and tribal entities. It promotes and encourages visitation to Arizona's rural and Tribal destinations. Through this program, industry partners outside Arizona's major metropolitan areas collaborate with AOT on advertising efforts extending the reach of their marketing programs, maximizing available funds, and increasing the overall exposure of their destinations. Program opportunities feature a robust media plan that includes digital, print, outdoor, and AOT publications, along with research and trade & media opportunities.

RESULTS

- ➔ 32 DMOs, Communities and Organizations Participated
- ➔ Invested \$1 Million to support rural and tribal communities

Social Media

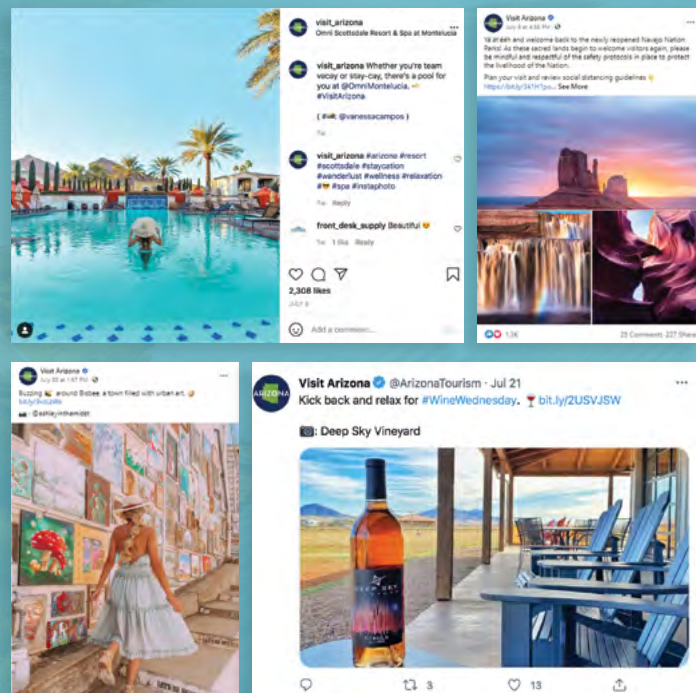
Strategic Goal

1

Social Media is an integral component to AOT's overall marketing efforts and is integrated into several campaigns. AOT uses several social media channels, including Facebook, Twitter, Instagram, Pinterest, and YouTube to connect with travelers and inspire Arizona visitation.

RESULTS

- ➔ 2,934,604: Combined Sum of All Engagements (Instagram, Facebook, Twitter, YouTube and Pinterest, including likes, reposts, comments, link clicks, saves, and shares)



Fulfillment

Strategic Goal

1

AOT fulfills visitor requests for travel planning assistance, provides travel planning materials, disseminates monthly email correspondence for "opt-in" consumers, and maintains comprehensive, informative websites to encourage extended visits to Arizona.

RESULTS

- ➔ Number of consumer packets: Travel Guides – 293,859; Maps – 263,695
- ➔ Top domestic request locations: Arizona, California, Texas, Florida, and Illinois
- ➔ Top international request locations: Canada, UK, France, Italy, and Germany
- ➔ Number of information requests: calls – 5,772; chats – 7,610

Local Media Coverage

Strategic Goal

2

AOT strives to communicate clearly, accurately, and consistently the agency's program of work and messages to various audiences including internal and external partners, stakeholders, media, residents, and consumers. AOT uses various media channels including a weekly eNewsletter, *Tourism Tuesday*, to communicate the agency's program of work and participation opportunities. AOT also uses public relations efforts to support the agency's various campaigns and programs.

RESULTS

- ➔ 443 Industry-Related Articles/ Broadcasts Generated
- ➔ Total Circulation: 889,000,000 Impressions
- ➔ Total Value: \$3.9 Million



Travel Trade Relations

Strategic Goal

1

AOT proactively works with the travel trade industry (tour operators, receptive tour operators, wholesalers, travel agents, airlines, etc.) in both domestic and international markets to build a global network of Arizona product experts.

RESULTS

- ➔ FAM Tours/Participants: 1 tour / 5 participants
- ➔ 10,072 Trade Sales Appointments Completed
- ➔ 163 Destination Trainings Conducted



Media Relations

Strategic Goal

1



AOT works with travel media (editors and journalists for newspapers, magazines, broadcasts, online, etc.) throughout the United States as well as international markets (primarily, but not limited to, Canada, China, Mexico, Germany, France, and the United Kingdom) providing them with unique article ideas regarding Arizona's travel experiences to generate positive third-party editorial exposure.

RESULTS

- ➔ Hosted 21 Journalists
- ➔ Generated 885 Feature Articles
- ➔ Article Impressions: 2.1 Billion



Community Engagement

Strategic Goal

2



Southern Arizona Heritage & Visitor Center

AOT collaborates with statewide industry partners to strengthen Arizona's tourism offerings for visitors. Through presentations, outreach programs, and technical assistance opportunities, AOT provides statewide tourism organizations and entities valuable marketing information and customer service skills to boost their visitor offerings and provide Arizona travelers with a high-quality experience. Additionally, AOT has officially designated several Arizona Visitor Information Centers (AVICs) throughout Arizona. Each center helps to promote local, regional, and statewide attractions, recreation opportunities, and hospitality amenities.

RESULTS

- ➔ Provided 62 Industry Presentations and Webinars
- ➔ Maintained and/or Designated 60 Arizona Visitor Information Centers

Partner Portal

Strategic Goal

3

AOT launched an industry-focused partner portal to streamline destination information from communities to the agency. The partner portal is free of charge and enables AOT to maintain accurate records of businesses and partners across the state and provide enhanced services and opportunities.

Partners are able to add and manage multiple contacts at a single business or organization; create and edit business listings for consideration on VisitArizona.com, listing deals and promotions; upload photos and access AOT's image library; and create consumer events listings to publish on VisitArizona.com.

RESULTS

- ➔ 472 Business Listings Added

